

### TENNESSEE'S MISSION STATEMENT

The mission of the Department of Tourist Development is to create and promote the desire to travel to and within Tennessee, to develop programs to encourage and support the growth of the state's tourism industry, to manage a system of welcome centers that provides visitors with a positive impression of Tennessee and to encourage them to extend their stay, all of which contributes to the state's economic growth, thereby enriching the quality of life for every Tennessean.



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#### MESSAGE FROM THE GOVERNOR

#### **Dear Friends:**

It is with great appreciation and respect that I write to congratulate members of the tourism industry for your outstanding work. The State of Tennessee is being recognized by domestic and international travelers as one of today's great tourism destinations.

Tennessee has moved from the 12th to the 11th most visited state among U.S. domestic visitors. In 2004, 43.64 million visitors traveled to Tennessee, an increase of more than 890,000 visitors over 2003 figures. Furthermore, our visitors created an economic impact of \$11.4 billion, which is a definitive example of why tourism is a major economic driver for the state. Your industry also employs more than 175,000 Tennesseans within the industry who work hard to promote, market and operate various attractions, destinations, festivals and outdoor events and many other tourist related activities.

I extend my thanks to Commissioner Susan Whitaker and the members of her staff for their dedication, vision and steady management in promoting this vibrant industry. And, I applaud Commissioner Whitaker for having the foresight to request a special \$4.5 million one-time-only appropriation to 'power launch' the state's new branding campaign and continue putting tourism in the forefront. The request was included in my 2005-06 budget and the General Assembly approved the appropriation. I want you all to know that the leadership of this state recognizes and respects the importance of tourism in Tennessee and believes fully in coordinated partnerships to further grow this vital industry.

I am proud to be Governor of the great state of Tennessee and I look forward to working with all of you to make Tennessee an even better place to live, work and vacation in the years ahead.

Warmest regards,

Phil Bredesen





#### MESSAGE FROM THE COMMISSIONER

Dear Tourism Colleagues and Friends of the Industry,

It's easy to get excited about tourism in Tennessee with all of its music, history, scenic beauty, outdoor recreation and friendly people. Tennessee is a place where bright lights, world-famous music, family entertainment and outdoor adventures create the perfect stage on which to play and vacation.

The goal of the Tennessee Department of Tourist Development is to let more and more people in on this good news, thereby increasing visitation to all parts of the state, growing the tourism industry business base and generating more revenue.

Today, we are making history by achieving those goals and continually striving to reach greater heights. In 2004, Tennessee made an historic jump from 12th to the 11th most visited state by U.S. domestic travelers. The increase of almost 900,000 visitors to 43.64 million moved Tennessee closer to our goal of making the top 10 in domestic visitation.



In addition, our research shows that the state's marketing dollars are making a significant difference in Tennessee's perception as a tourist destination as well as playing a role in generating more tax revenue for state and local governments. A new consumer research study by Longwoods International regarding our \$1.8 million test market campaign in 2004 shows that for every dollar spent on advertising the new campaign generated \$17.40 in sales tax revenue - \$11.14 for the state and \$6.26 for local communities. This is a 22 percent increase from 2003 tax figures.

The power launch of our campaign, featuring entertainment icons Dolly Parton and Isaac Hayes, began July 1, 2005, with the special one-time-only appropriation from Governor Phil Bredesen and the Tennessee General Assembly. The new funding is allowing the department to expand the marketing campaign from nine to 14 of our key driver markets and place larger more frequent buys to generate the results to keep the industry expanding. The \$4.5 million appropriation has enabled the department to participate in more than 10 print advertising co-op initiatives, giving the industry an opportunity to partner with us in significant national publications.

On behalf of the entire tourism industry, I would like to thank both Governor Bredesen and the Legislature for the confidence they have placed in our collective ability to effect positive economic growth for this beautiful state. We all look forward to continuing to play a major role in Tennessee's future successes.

It is my privilege to be able to travel throughout this great state, visiting its many unique attractions and destinations. It is unquestionably a place that has been blessed with great beauty and a rich heritage of entertainment. We must continue to work together for the performance of a lifetime, making Tennessee center stage for visitors from around the globe.

With sincere appreciation for all you do for tourism, Aman Whitaker



#### STRATEGIC INITIATIVES UPDATE

The Tennessee Department of Tourist Development is pleased to announce significant accomplishments as part of our major strategic initiatives undertaken since the beginning of Governor Phil Bredesen's administration.

During the last three years, the Department has focused on getting the word out about Tennessee through a wide variety of programs ranging from publicity to advertising to Internet marketing. In addition, the state's industry has worked tirelessly to move our state forward.

The list below is an exciting array of achievements that our industry has been able to reach through partnerships and a commitment to making Tennessee a world-class destination.

#### **Tennessee Moves Into 11th Place**

The number of visitors to Tennessee in 2004 outpaced 2003's figures by 890,000, according to the Travel Industry Association of America's (TIA) 2004 TravelScope Survey. The increase from 42.75 million domestic visitors to 43.64 million was a 2.1 percent increase and moved Tennessee from 12th to 11th in the country based on domestic travel volume by U.S. residents as measured in person trips.

The survey states that Tennessee's domestic leisure travel visitors increased 7.1 percent in 2004, jumping from 34.7 million person trips to 37.1 million person trips. The state also saw an increase in the number of domestic visitors who were spending at least one night during a trip to Tennessee. In 2004, Tennessee's domestic overnight travel volume increased 4.6 percent from 26.1 million visitors in 2003 to 27.3 million visitors in 2004.

#### **Tourism's Economic Impact Increases 6.25 Percent in 2004**

Tennessee's tourism industry economic impact jumped from \$10.8 billion to \$11.475 billion in 2004, an increase of 6.25 percent. Since Governor Phil Bredesen took office in 2003, the tourism industry's economic impact has grown more than \$1 billion from \$10.3 billion, an increase of 11.4 percent.

#### **Advertising Campaign Investment Generating Tax Revenue**

The Department's new branding/advertising campaign was launched April 2004 and test marketed in nine key markets – Atlanta, Little Rock, St. Louis, Birmingham, Greenville-Spartanburg-Asheville, Louisville, Lexington, Huntsville, and Cincinnati. The campaign features Tennessee natives Dolly Parton and Isaac Hayes in television, radio and print advertisements. The test initiative generated impressive results. The inquiries in the test markets doubled or increased by 2.5 after the television spots ran. In fact, inquiries from the Atlanta market tripled. The campaign continued in 2005 in target markets.

Not only is the campaign drawing the attention of consumers, it's generating tax revenue. A new consumer research study by Longwoods International regarding our \$1.8 million test market campaign in 2004, shows that for every dollar spent on advertising the new campaign generated \$17.40 in sales tax revenue – \$11.14 for the state and \$6.26 for local communities. This is a 22 percent increase from 2003.

#### **Special Appropriation Funds Power Launch of Campaign**

In November 2004, the Department presented its budget and marketing plan to Governor Bredesen for FY 2005-06. The budget included a one-time appropriation of \$4.5 million to "power launch" the state's new branding campaign. Governor Bredesen included the allocation as part of his proposed budget to the Tennessee General Assembly, which approved the \$4.5 million funding during the session.

A "power launch" for 2005-06 means expanding the state's key driver markets from the nine that were part of the test market campaign to 14. It also calls for putting in place larger, more frequent buys that help generate the results to keep the industry expanding. In addition, the plan includes 10 print co-op opportunities for the industry. (See page 6 for complete details of the new marketing plan).





#### **Vacation Guide Inquiries on the Rise**

Since the 2005-06 marketing initiative was launched in July, the Department's inquiries for the Vacation Guide have increased significantly. In July 2005, the department had 39,087 inquiries compared to 31,083 in July 2004 and 17,204 in July 2003. In August 2005, the department had 41,954 inquiries compared to 18,355 in August 2004 and 11,452 in August 2003.

#### **TNvacation.com Relaunches with New Look and Features**

In late July, the Department launched a new version of the state's consumer tourism site, www.TNvacation.com. The site has the same Web address, but a totally different look along with new features for the traveler and the Department's industry partners. (See page 8 for additional details of the revised Web site).

#### **News Bureau Wraps Up First Year**

The Department's News Bureau, www.tenntravelnews.com, distributed news releases in the first year of operation for nearly 350 industry partners in 82 of Tennessee's 95 counties. The bureau's release distribution and targeted pitches generated coverage in 40 states and eight foreign countries, including outlets such as *USA Today*, CBS This Morning, *The Boston Globe*, *The Dallas Morning News* and *The London Daily Times*. More than 400 media have registered on the site to download stories, tourism information and photographs.

#### **Travel Writer Tours Crisscross State**

More than 40 travel writers visited Middle Tennessee and Middle East Tennessee as part of media tours of those regions in 2004. The Middle Tennessee tour covered cities from Clarksville to Nashville to Shelbyville. The Middle East tour visited a wide array of attractions throughout the region from Cookeville to Townsend to Chattanooga. The Department also hosted tours in West Tennessee and the Upper Cumberland in the last two years. During these four tours, more than 100 writers spent 28 days touring the state.

#### Vacation Guide Touts the Best of Tennessee

During 2005, 500,000 of the Department's 168-page, full-color free Vacation Guide will be distributed to travelers from around the world. The guide showcases the state's three grand regions and our wide array of attractions, accommodations, state parks, agritourism locales, events and destinations.

#### **TDTD Sales Team Promotes Tennessee Around the World**

During the past year, the Department's sales team attended more than 20 sales missions and trade shows promoting Tennessee. The sales efforts hit such events as NTA in Canada, ABA in Chicago, TIA Pow Wow in New York, Rhythms of the South in New Orleans, Deep South Sales Mission in the United Kingdom, the Great American Golf Show in Indianapolis and the Camping and RV Show in Atlanta, just to name a few.

### Co-op Marketing Initiative Provides Matching Funds for Local Tourism Projects

In 2004-05, the Department gave matching funds of \$1 million to more than 60 local and regional agencies throughout the state for tourism related projects. The projects ranged from promoting festivals to marketing campaigns.





#### THE STAGE IS SET FOR YOU!

### Tennessee Department of Tourist Development Includes Power Launch for 2005-06 Marketing Plan.

This year, the Tennessee Department of Tourist Development applied a \$4.5 million one-time appropriation by the Tennessee General Assembly toward a "power launch" of the state's branding campaign, "Tennessee. The Stage Is Set For You!" The campaign features Tennessee natives Dolly Parton and Isaac Hayes in television, radio and print advertisements.

Initially launched in April 2004, the campaign was tested in nine key markets – Atlanta, Little Rock, St. Louis, Birmingham, Greenville-Spartanburg-Asheville, Louisville, Lexington, Huntsville and Cincinnati. The test initiative generated impressive results - inquiries in the test markets more than doubled after the television spots aired. In Atlanta, inquiries tripled after the spots ran.

The "power launch" for 2005-06 expanded the key driver markets from nine to 14 markets and placed larger, more frequent buys to boost growth.

In 2004, the state received nearly 44 million domestic visitors, an increase of approximately 890,000 over 2003. This growth helped move Tennessee up to 11th place of the most visited states by U.S. residents.





#### DIVISION RESPONSIBILITIES

Each division within the Department of Tourist Development (TDTD) specializes in a set of core skills and responsibilities. The following section provides information about the Department's divisions and their areas of discipline.

#### MARKETING DIVISION

In fiscal year 2005-2006, the Marketing Division has been busy developing and executing many of the exciting projects that were introduced to the industry last year. Of course the most visible area that falls under the Marketing Department is the advertising program. This is especially exciting this year as the Governor allocated, and the legislature approved, an additional \$4.5 million in this year's budget for a power launch of the new marketing campaign featuring the slogan, "Tennessee. The Stage is Set for You!"

Our research shows when people are exposed to the television and radio spots featuring Tennessee celebrities Dolly Parton and Isaac Hayes, they are very effective. The inquiries in the nine test markets doubled or increased by 2.5% after the television spots ran. In fact, inquiries from the Atlanta market tripled. The additional funding allows the Department to expose many to the new campaign. If the results are compatible with those received from the test launch last year, the new numbers will be tremendous.

Another popular initiative administered within the division is the marketing co-op program. This provides tourism organizations with the opportunity to expand the impact of their marketing message, increase visitation to their communities and increase travel-generated revenues. The number of applications this year exceeded even last year's numbers. The department is very pleased with the quality of requests this year and spent many hours reviewing the proposals and look forward to seeing these various marketing programs come to fruition.

The Department is continuing to expand and integrate the eCRM (electronic customer relationship management) system, an opt-in inquiry database of people expressing interest in getting hot deals, specials and information about specific category interests from TDTD and its tourism partners. The inquiries are being generated through the state's Web site, www.TNvacation.com, the call center, print and broadcast media buys and our emarketing campaign.

To further develop, strengthen and maximize the lifetime value of this database cost-effectively, TDTD is providing its tourism partners an opportunity to participate with a turnkey ongoing e-mail communications campaign. Participating tourism partners are able to promote hot deals and specials for their attraction or destination through the state's ongoing e-mail communications campaign based on opt-ins for specific category interests that are key drivers for Tennessee vacations (Music and Nightlife, Historic Places & Museums, Outdoor Recreation, Theme Parks & Attractions, Cultural Events & Festivals, Romantic Getaways and Golf).

Timeliness is critical in this facet of the database's value and will become even more so as vacation planning cycles continue to compress. By staying in touch with this opt-in database through e-mail communications on a regular basis and giving the consumer content related to their specific travel interests, discretionary trips and vacations can be swayed more often toward Tennessee and its tourism partners, resulting in more visitors staying longer and spending more money. The Department will continue to track and measure the effectiveness of this e-Marketing initiative to optimize future endeavors and maximize ROI for Tennessee and its tourism partners.



### TN vacation.com ... A NEW LOOK!

In late July, the Department launched a new version of the state's consumer tourism site, www.TNvacation.com. The site has the same Web address, but a totally different look along with new features for the traveler and the Department's industry partners.

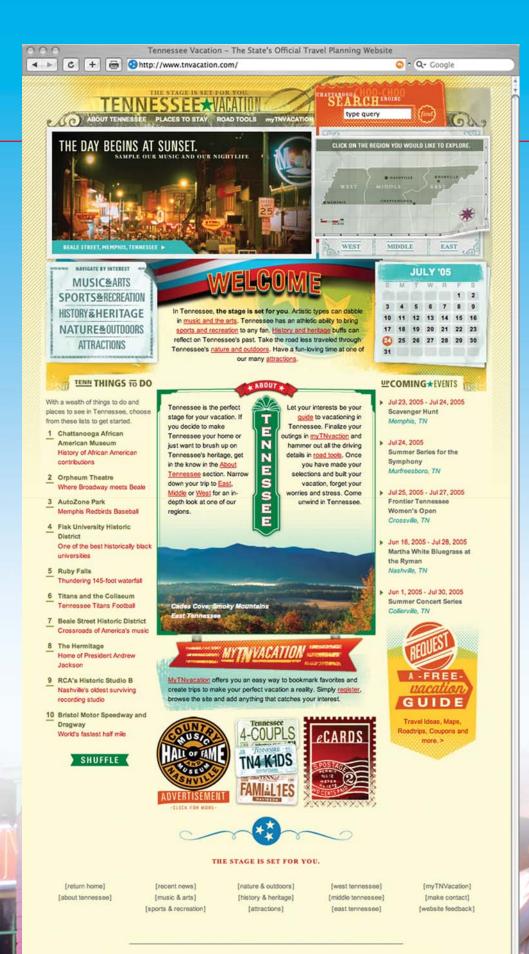
The dynamic and unique graphic design is based on the Department's marketing campaign, "Tennessee. The Stage Is Set for You!" The new site features a navigation that has been streamlined and strategically grouped according to an easy three-level scheme - interest, geography, and function. The main interest areas include Music & Arts, Sports & Recreation, History & Heritage, Nature & Outdoors, and Attractions.

A number of new highlights include e-Post Cards, seasonal information pages such as holiday events or fall foliage vacation ideas, maps/driving directions, detailed partner pages, and a Trip Builder, which are all functions developed to lengthen a user's time on the site. A new feature on the main page is a "Top Tenn Things to Do," which changes with each visit to the site and includes a shuffle feature that allows a visitor to repeatedly refresh the list with new things to do throughout the state.

Each attraction, destination, accommodation, etc., listed in the Department's Vacation Guide has a partner page on the new version of the Web site. The partner pages have a variety of new functions. The partner may:

- Update contact information.
- Update amenities, hours, payment types, admission information and dates closed.
- Change description text in main area.
- Set a Web site address (link opens in new window from the TNvacation.com site).
- Set a purchase Web site address. This is for partners who offer ticket sales or reservations online, giving a direct link for the user into the ecommerce/purchase part of a partner's Web site.
- Upload pictures. After two or more photos have been uploaded, a photo gallery is automatically created on the partner page for browsing.
- Create/upload coupons and deals. Partners can upload coupons or other deals to appear on the partner page for users to download.
- Create an event to appear in the event area of the site, as well as on the partner page.
- Update driving directions.





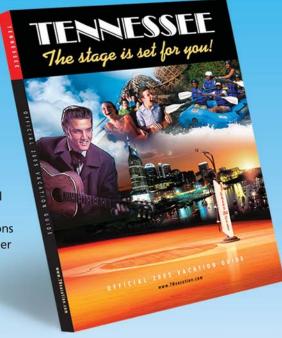
Disclaimer: The use of trade, firm, or corporation names in the publication (or pages) is for the information and convenience of the reader. Such use does not constitute an official endorsement or approval by the Tennessee Tourism Department of any product or service to the exclusion of others that may be suitable.

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#### ADVERTISING

Last year, the Department launched an advertising campaign anchored in the theme "Tennessee. The Stage Is Set For You!" The campaign leverages the state's unparalleled music heritage as a launch pad to all of the other destinations available to visitors, including outdoor adventures, historical sites, family attractions and many other experiences. The campaign has proven to be such a success that it has been continued this year and was expanded to include messages targeting fall visitors.

"Tennessee. The Stage Is Set For You!" includes television, radio and print messages and features two legendary entertainers with deep Tennessee roots, Dolly Parton and Isaac Hayes. In all media, both icons invite the audience to "play on our stage," with supporting voiceover and copy urging viewers and listeners to visit www.TNvacation.com or call 1-800-GO-2-TENN for a free Tennessee Vacation Guide.



#### BROADCAST

Television and radio spots featuring Parton and Hayes were continued this year. In addition, new versions of the spots were created to encourage visitors, both in-state and out-of-state, to explore fall attractions throughout Tennessee. The television spots aired on popular cable channels such as the Travel Channel, Food Network and Discovery Channel while the radio spots appeared on regional outlets, including the Titans Radio Network.

#### PRINT

Print advertisements featuring the "stage" theme of the campaign were carried through this year in popular magazines and newspapers. The Department increased the national exposure of the ads in 2005-2006. addition to placements in *Southern Living and Family Circle*, print ads will appear in *Oprah*, *Parents*, *People* and *Fortune* magazine's 75th anniversary issue in 2006.





#### **Tennessee Department of Tourist Development FY 2005 - 20**

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### 006 Power Launch Plan: Advertising Flow Chart

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### THE STAGE IS SET FOR YOU!













#### COMMUNICATIONS DIVISION

The Communications Division manages the Department's media relations, public relations, industry relations and Internet marketing initiatives. The division also focuses on promoting the Department's policies, initiatives and industry trends at the state level.

The division directs the Department's local, regional and national media relations efforts via travel media tours throughout the state, proactive targeted media relations and the TDTD News Bureau, www.tenntravelnews.com. The News Bureau, which was outsourced during its first year of operation, will be brought in-house and staffed by the Department beginning October 1.

The News Bureau uses technology and media relations to connect news organizations with Tennessee tourism news sources across the state. The News Bureau distributes news on a regional, national and international level for tourism entities across the state. The Bureau's scope of services puts all of the state's tourism industry partners on a level playing field with the media, from the smallest festival to the largest attraction. The in-house News Bureau will concentrate its efforts on targeted national media relations, local and regional media relations as well as on media relations in the state's 14 key driver markets.

In addition to the News Bureau's operations, the division works extensively with electronic and print media to supply articles, interview subjects, story ideas, photographs and video clips. Division staff members also answer editorial inquiries, check writers' facts and submit editorial copy upon request to Travel South USA, National Tour Association, American Bus Association, American Automobile Associations and other national partners in the tourism industry. Media kit development, travel itineraries, travel media tours, copy writing, photo libraries, and day-to-day media and industry relations all comprise the division's routine activities.

The Communications Division also assists regional tourism offices with media relations and targeted media lists. The Department also consults on brochure and guidebook development, travel maps, copy writing and editorial critique of industry pieces upon request.

The Department's Web site, wwwTNvacation.com, was re-launched with an entirely new look in July. The development of the site was directed by the division's staff. On a day-to-day basis, staff members work with the Information Systems Division and the Department's Web site development contractor to update and enhance the new site. The division also manages the development and production of the Tennessee Vacation Guide, produces the annual and seasonal Events brochures and collaborates with the Department of Transportation to produce the Official Tennessee Transportation Map. Other programs include the annual "Fall Color Forecast," featuring a toll-free information line (800-697-4200) from September through November, and the annual "What's New in Tennessee!" report segment distributed electronically to the media.





#### OBJECTIVES:

- Increase the number of positive editorial stories published in regional, national and international publications.
- Increase public awareness of the importance of tourism to the state's economy through positive and proactive communication with the news media.
- Manage the day-to-day operations of the TDTD News Bureau, www.tenntravelnews.com.
- Produce motivating publications, e-newsletters and Internet articles highlighting Tennessee's diverse vacation opportunities.
- Enhance and update the content and technology of the Department's consumer Web site, www.TNvacation.com.
- Work closely with local travel industry officials as well as regional travel organizations.
- Utilize the consumer Web site as a marketing and public relations tool to help increase awareness and access to travel information.
- Assist tourism promotional efforts at the local level with specific projects.

#### STRATEGIES:

- Maintain strong relationships with targeted publications, editors and freelance writers.
- Offer assistance to regional directors and Convention and Visitors Bureaus in their efforts to attract travel media and encourage positive coverage of their areas.

- Offer a media resource Web site that provides writers and editors immediate access to division personnel and information.
- Participate in professional travel writer associations and activities.
- Continue to utilize a software program that manages media listings and also tracks and analyzes clippings to determine circulation and ad value of articles placed.
- Maintain and continue to develop the following promotions, special events and publications:

Release of 2006 Official Tennessee Vacation Guide December

Release of 2006 Annual Events Brochure December

Release of '05-'06 Seasonal Events Brochures Quarterly

Release of 2006 Official Transportation Map December

Fall Color Forecast/Events Line & Web site Link Sept. 26 – Nov. 30

Release of 2006 "What's New in Tennessee" December

- Provide the Tennessee travel industry with media information and photography, using 35mm and electronic formats as needed.
- Maintain an accurate and up-to-date listing of statewide events and festivals on the Department's Web site throughout the year.



#### CO-OP PARTNERSHIP PROGRAM

The major objective of the co-op partnership is to increase the number of communities served by the program and broaden the economic benefits across the state.

The guidelines were more specifically defined to make application for this year's co-op program easier for the travel industry. In addition, the application process began earlier to give applicants more time to complete the projects. The application deadline was July 31, and the announcement of 2005-2006 awards was made in September. There were 65 applicants for this year's program.

#### OBJECTIVES:

- Provide funding and support to industry partners, thereby giving them the opportunity to expand the impact of their marketing message, increase visitation to their communities and increase travel-generated revenue.
- Build awareness in the new state tourism slogan, "Tennessee. The Stage is Set for You!"
- Increase awareness and interest among target audiences of Tennessee's diverse tourism opportunities.
- Increase the economic impact of travel in Tennessee through strategic tourism promotions and partnerships.
- Build awareness and use of the Department's consumer Web site, www.TNvacation.com.

#### MARKETING SUPPORT - RESEARCH

The purpose of the research division is to assist the Department staff in understanding the Tennessee tourism product and the Tennessee visitor. With this knowledge, the Department can better analyze advertising opportunities and make strategic and cost-effective decisions.

We will continue to analyze existing and potential markets and disseminate vital information to tourism partners. In 2004, the Department sent more than 80,000 e-mails to tourism partners informing them of the latest research, tourism news and grant opportunities.

The Department continues to provide demographic and psychographic information to the industry via the annual report, including the origin of visitors as well as various spending behaviors. By learning more about the Tennessee visitor, the Tennessee Department of Tourist Development can continue to find innovative and effective strategies to increase visitation.





#### OBJECTIVES:

- Find new avenues to fine-tune research information and gather data that supports niche-marketing efforts.
- Improve tourism-related information, research and forecasts to more effectively meet the needs of the tourism industry.
- Enhance the dissemination of relevant research information, such as demographic data, to the Tennessee travel industry by making it available online.
- Maintain professional relationships with the national tourism industry, associations and research organizations, such as the U.S. Travel Data Center and the Travel Industry Association of America (TIA).
- Provide insight into travel volume, market share and trip characteristics of visitors traveling to and through Tennessee.
- Develop an online resource for state and federal tourism grant opportunities.

#### STRATEGIES:

- Research traveling customers to take advantage of new trends and opportunities.
- Research topics that target specific segments of the industry as well as general tourism-related resource articles.
- Participate in cooperative travel studies to measure travel volume, market share and trip characteristics such as purpose of trip, transportation mode, destination, activities, accommodations, spending, etc.
- Continue to distribute the Economic Impact Report to the travel industry, focusing on revenue, tax collections and employment data.

- Develop an online grant opportunities resource page for tourism partners. The information will be updated on a monthly basis and is located at http://www.state.tn.us/tourdev/onlineservices.html.
- Develop an online version of quarterly travel trend reports. These reports are provided to show the most current trends for selected tourism activities utilizing data provided by the Tennessee Department of Revenue. The availability of timely data focusing on revenue, state and local tax collections will provide the travel industry with the ability to monitor trends. These reports are available on the Department's Web site at http://www.state.tn.us/tourdev/pdf/useguide.pdf.



#### SALES DIVISION

#### (Corporate, Travel Industry, International, Group Travel, AAA, Consumer)

The Sales Division is responsible for the planning and implementation of the Department's corporate and travel industry sales programs, which includes national and international group tour companies, AAA, travel agents, the leisure travel market and other regional and national tourism organizations that influence travel to Tennessee. The division is committed to ensure the dissemination of updated information and sales strategies along with developing partnership opportunities to the travel and tourism industry across the state.

#### **Industry Partnerships**

The Department's partnerships in the industry are one of our most valued assets when it comes to selling and promoting Tennessee. Partnerships outside the state are also a valuable tool. The division participates with organizations such as the Southeast Tourism Society and Travel South USA regarding sales and special projects throughout the Southeast. For example, this year, Travel South USA has focused its international marketing efforts exclusively on the Canadian market. TDTD will be participating in the first Canadian Sales Mission in September. A partnership with Rhythms of the South has been successful as well. TDTD joins forces for a fourth year with the State of Georgia and Louisiana, as well as the Nashville, Atlanta and New Orleans Convention and Visitors Bureaus, to have a strong marketing effort that focuses on this region and its unique musical heritage. TIA's PowWow also proved to be very strong in 2004-05 and the Department will look to participate in the 2006 event in Orlando.

The Department will continue to participate in the Travel Alliance Partners (TAP) program Southern Treasures, a partnership between several southern states including Tennessee, Arkansas, Louisiana, Mississippi, and Missouri. TAP, a group of tour operators with offices throughout North America, is a very successful and solid program and gives the state great exposure in the group travel marketplace.

Tennessee is also part of the Natchez Trace Compact with the states of Mississippi and Alabama. By joining the Compact, Tennessee has enhanced marketing efforts of the Natchez Trace region, serving several counties and Nashville. The Natchez Trace Parkway is a very popular national scenic byway with international as well as domestic markets.

#### **Consumer Travel Shows**

The Sales Division also coordinates participation in consumer travel shows in target markets. These shows are staffed by three regional marketing and public relations managers with the assistance of Welcome Center staff during the winter months. The Department attends five to six shows a year. The categories include boat, sport and travel, camping & RV and golf shows. TDTD continues to partner with Tennessee State Parks to staff the shows.





#### **Cultural/Heritage Tourism**

This division also serves as the cultural/heritage tourism contact for the state and is involved in many projects, including TIA's Cultural Heritage initiatives and the Tennessee Civil War National Heritage Area. The TDTD and the National Heritage Trust have held several meetings to study a statewide Civil War Trail. The Department is looking at what other states, such as Virginia, Maryland and North Carolina have successfully accomplished in this area. Tennessee ranks second in Civil War sites and battlefields and plans to establish a viable product across Tennessee that will attract significant numbers. The Department plans to attend the Cultural Heritage Tourism Conference later this fall in Washington, D.C.

#### **Group Tour**

Domestically, the Department works with group tour operators providing new and unique itineraries. As the market changes, the Department will educate the operators and become more familiar with niche segments such as minority groups, student groups, family reunions, religious and corporate organizations and agri-tourism groups. For the individual leisure market, the state's greatest growth area, the Department will focus on counselor education at major AAA/CAA offices. Sales missions and training seminars in new markets continue, as do business enhancement programs with existing markets.

#### **International**

Internationally, TDTD continues to increase market share in the United Kingdom and Germany by maintaining our partnership with Lofthouse Enterprises. There are now 73 tour operators selling Tennessee in the UK and there are as many as 38 new Tennessee products featured for 2005. The significant increase in product is indicative of the continued growth of interest and demand for Tennessee in the UK. The European market continues to react to the demands and buying patterns of the consumer by offering a more fully extensive "a la carte" service in 2006. The TDTD continues to focus on receptive tour operators through sales missions and training sessions while developing niche markets such as adventure and heritage.

Additionally, the Tennessee Department of Tourist Development will continue to encourage partnerships in all areas, internationally and domestically, and look for new opportunities to successfully implement our sales and marketing strategies throughout the state.

Note: Dates of trade shows, travel shows and sales missions appear on page 41.



## THANKESSEE

#### TRAVEL INDUSTRY SALES - AAA/CAA

#### OBJECTIVES:

- Educate and motivate travel agents and auto counselors to present Tennessee to their clients as a vacation choice.
- Participate in proactive sales opportunities such as sales missions and industry/consumer trade shows to increase visibility and interest.
- Develop new promotional partnerships for Convention and Visitors Bureaus, Chambers of Commerce and tourism attractions.
- Distribute information and collateral material to counselors and agents for reference and distribution.
- Act as a liaison between the State of Tennessee and the Tennessee travel industry, Tennessee travel counselors and Tennessee travel agents in producing successful sales initiatives.

#### STRATEGIES:

- Continue to conduct AAA sales missions and training sessions to targeted markets. Attend regional and national trade shows and conferences.
- Assist in hosting AAA familiarization (FAM) tours in partnership with Convention and Visitors Bureaus and attractions.
- Increase regular communication with targeted clubs and agencies that are focused on new state events and attractions.
- Maintain and update AAA/CAA database for industry reference and dissemination.
- Coordinate industry partnerships for group sales initiatives.





#### INTERNATIONAL

#### OBJECTIVES:

- Increase economic impact of international travelers by increasing overseas visitation and helping to extend their length of stay.
- Increase market share in the primary markets (United Kingdom, Scandinavia, and German and Dutch-speaking countries).
- Continue to update and educate receptive tour operators, build new relationships and maintain existing ones.
- Coordinate international efforts, including overseas offices, and provide leadership to the Tennessee travel industry from abroad.
- Maintain emphasis on the consumer market including public relations/media and travel shows.

#### STRATEGIES:

European Markets – United Kingdom, Ireland, Belgium, Netherlands, Scandinavia, Austria and Switzerland. Maintain partnership with Lofthouse Enterprises with David Nicholson in the UK as well as with Wolfgang Streitboerger and Rachel Obermeier in the German market.

- Conduct sales calls on tour and travel industry.
- Partner with Travel South USA in its new international marketing program with the Canadian market.
- Partner with Southeast Tourism Society in Sales Missions and other co-op opportunities.
- Host FAM Tours to Tennessee for travel industry and media.
- Continue Deep South Sales Mission initiative with Mississippi, Louisiana, Georgia and other partners.
- Work with colleagues in surrounding states to develop new niche itineraries with outdoor, historical, musical, technical and agricultural themes.
- Attend Rhythms of the South Marketplace.
- Attend TIA's International PowWow Marketplace.



#### GROUP TOURS/TRAVEL SHOWS

#### OBJECTIVES:

- Work with the Tennessee travel industry to provide services and partnership opportunities to increase visitation to the state.
- Continue to strengthen existing relationships with domestic tour operators and explore new markets resulting in new and increased business.
- Increase motor coach tours into the state and educate operators by participating in national/ regional trade conventions and sales missions.
- Heighten Tennessee's presence as a premier motor coach destination in the Canadian market through Southeast Tourism Society (STS) and Travel South USA.
- Provide educational opportunities for the domestic tour operators and the state travel industry.
- Create awareness of Tennessee's outdoor recreation to the consumer market.



#### STRATEGIES:

- Participate in sales missions involving sales calls to major tour operators.
- Participate in Travel Alliance Partners (TAP) for group tour operators.
- Encourage operator FAM tours to showcase Tennessee.
- Exhibit at all major trade shows such as National Tour Association (NTA), American Bus Association (ABA) and Travel South Showcase.
- Maintain a presence at operator's annual meetings by delivering statewide presentations.
- Continue sponsorship of operator dinner at the National Tour Association's annual convention, which provides a one-to-one operator/supplier ratio.
- Continue to sponsor, with industry partners, the Tour Operator Breakfast during the NTA Spring Meet.
- Conduct follow-up calls and mailings to continually update operators regarding new and unique destinations and attractions.
- Distribute qualified leads to the travel industry following conventions, marketplaces and sales missions.
- Continue memberships and participation with Ontario Motor Coach Association (OMCA) and, Tennessee Motor Coach Association (TMCA).
- Participate in Consumer Travel Shows (Boat, Sport and Travel, Golf, RV and Camping) during the winter months.



#### INFORMATION AND SUPPORT SERVICES

The goal of the Office of Information and Support Services is to provide our staff, the industry and the traveling public the necessary technology for seamless travel planning. This division focuses on excellent customer service by providing prompt responses to inquiries, both electronically and by telephone.

It is also important to assist employees with maintaining a good knowledge of the process so they may efficiently respond to visitors' requests. To achieve this result, the division offers access to continuous employee training so they can build and maintain their technical and professional skills.

A significant increase in public information inquiries over the past several years, via our call centers and Web site, affirms the need for enhanced development of our technology systems. Effectively tracking the hundreds of thousands of Web site and call center inquiries, plus providing a strong technological infrastructure, ensures these inquires are fulfilled and information reaches the potential visitor in timely fashion.

#### OBJECTIVES:

- Maintain competitive advantage for visitation by providing excellent customer service and satisfaction. Key to this objective is timely responses to visitor inquiries.
- Research the latest technological opportunities for providing a solid information systems infrastructure.
- Attract visitors with a dynamic Web site that emphasizes the diverse tourism opportunities available within our state.

#### STRATEGIES:

- Monitor the compilation of visitor data from the Web site, as well as requests for the Tennessee Vacation Guide and other Department publications.
- Improve the Department's information systems infrastructure, hardware and software by implementing appropriate upgrades such as Microsoft WindowsXP.

- The Department's technical staff will continue to share ideas and communicate available tourismrelated technology with the State's Office of Information Resources.
- Assist the Communications Division and the Department's contracted Web developer by providing the expertise necessary to maintain an innovative, resourceful and technologically effective Web site.
- Provide our visitors with helpful and courteous telephone support staff to respond to their inquiries.
- Respond promptly to consumer and travel industry requests through the Department's mailroom.
- Monitor call center and fulfillment contracts and coordinate all information systems contracts.

#### WELCOME CENTERS

The Department operates 13 statewide Welcome Centers located on all major interstate highway entrances to Tennessee. Twelve of the centers are open 24 hours a day, seven days a week. The Welcome Centers serve as a contact point for travelers entering Tennessee from any direction and serve as a distribution point for information on the state's attractions, accommodations and other recreational facilities.

In 2004, more than 13 million visitors came through the centers requesting travel information. Each center is staffed with professional and knowledgeable personnel who assist visitors seeking information and encourage extended travel throughout the state by introducing new and interesting destinations.

Tennessee's Welcome Centers provide a variety of services to the Tennessee traveler. Each facility's hosts or hostesses can make statewide reservations for overnight accommodations, restaurants or attractions. The staff can provide travel itineraries via statewide tourism brochures and other travel planning tools. The centers also provide weather forecasts and road construction updates via electronic monitors.

#### OBJECTIVES:

- Provide and maintain a clean and comfortable environment for Tennessee travelers to relax and gather tourist information.
- Maintain a professional and knowledgeable staff to assist visitors encouraging extensive travel throughout the state.
- Work closely with the travel industry to better communicate the tourism and hospitality opportunities available to the visitor.

#### STRATEGIES:

- Display brochures and vacation guides in all 13 centers.
- Provide a variety of current tourist information to visitors including accommodations, restaurants, attractions, events and activities.
- Plan itineraries and make reservations for travelers.
- Continue to stock highway rest areas with statewide brochures.

- Maintain good communication with the Tennessee travel industry to keep brochures current and up to date.
- Track vehicle counts on a monthly basis to distribute to the travel industry upon request.
- Encourage industry partners to exhibit or display their destination or attraction in the centers.
- Provide national weather forecasts to visitors.
- Reconstruct Chattanooga I-75 center within 1-2 years.
- Construct a new Welcome Center in east Tennessee on I-26 within 1-2 years.

Note: Welcome Centers are operated by the Department of Tourist Development.

Rest Areas with restroom facilities are operated by the Department of Transportation.



#### **2004 Visitation at Tennessee Welcome Centers**

WELCOME CENTER	JAN.	FEB.	MAR.	APR.	MAY	JUN.	JUL.	AUG.	SEP.	ОСТ.	NOV.	DEC.	TOTAL
Ardmore I-65	52,120	58,523	88,370	95,785	81,678	82,663	95,278	76,230	72,375	71,418	64,380	62,953	901,773
Bristol I-81	101,795	94,253	111,495`	120,308	128,250	143,055	155,315	141,133	117,755	90,908	104,953	102,945	1,412,165
Chattanooga I-75	69,725	66,108	116,178	126,145	90,753	112,763	130,315	104,240	96,203	98,070	94,003	90,808	1,195,311
Clarksville I-24	84,755	78.648	89,618	97,423	102,368	116,048	129,855	113,325	102,358	108,288	98,035	90,750	1,211,471
Dyersburg I-155	13,215	13,008	16,910	18,485	20,775	21,938	23,525	21,168	20,895	19,963	17,383	14,255	1,318,928
Jellico I-75	81,815	82,470	106,625	116,285	106,860	127,468	143,563	115,758	99,648	131,848	107,500	99,088	1,318,928
Memphis I-40	12,905	14,645	24,983	26,220	31,953	34,575	40,778	45,240	28,920	29,600	26,785	10,983	327,587
Memphis I-55	27,828	28,115	36,393	34,783	35,493	37,723	40,940	36,793	32,200	32,795	30,168	30,283	403,514
Mitchellville I-65	89,903	87,328	103,628	109,875	107,763	121,813	136,695	117,123	108,715	118,775	102,728	98,758	1,303,104
Hartford I-40	34,503	33,640	47,860	66,260	70,260	84,363	93,760	65,493	56,028	66,485	62,900	53,738	735,290
Nickajack I-24	80,268	83,615	114,715	119,353	108,223	128,865	127,565	112,635	97,935	106,803	102,098	94,901	1,277,045
Smith Co. I-40	107,298	128,265	155,005	161,088	176,403	206,725	200,895	178,585	166,535	185,018	179,128	148,318	1,993,263
Tiftonia I-24	73,825	73,873	93,868	95,158	100,175	107,850	128,813	99,900	92,253	113,198	90,660	85,420	1,154,993

TOTALS 829,955 842,491 1,105,648 1,187,168 1,160,954 1,325,849 1,447,297 1,227,623 1,091,820 1,173,169 1,080,721 983,269 13,455,964

Source: Tennessee Welcome Centers Street-a-Meter Report

NOTE: This report reflects approximate number of visitors – compiled by multiplying 2.5 people per vehicle.





#### TENNESSEE WELCOME CENTERS

#### **CENTRAL OFFICE**

Barry Young, Director of Welcome Centers (615) 741-9035 Tami Giles, Welcome Center Assistant (615) 741-9012 Tennessee Department of

Tourist Development 312 8th Avenue North Tennessee Tower, 25th Floo

Tennessee Tower, 25th Flooor Nashville, TN 37243

### 1 MEMPHIS I-55 WELCOME CENTER

Betty Settles, Manager (901) 543-7628 Fax# (901) 345-5956

E-mail: Betty.Settles@state.tn.us
Shipping: 3910 I-55 on the Mississippi line
Memphis. TN 38116

Mailing: P.O. Box 16694

Memphis, TN 38186-0694

### DYERSBURG WELCOME CENTER Buddy Miller, Manager

(731) 286-8323 Fax# (731) 286-8324

E-mail: <u>Buddy.Miller@state.tn.us</u>
Shipping: I-155 eastbound four
miles west of Dyersburg

Dyersburg, TN 38024

Mailing: P.O. Box 84 Dyersburg, TN 38024

#### MEMPHIS I-40 WELCOME CENTER

George Stewart, Manager (901) 543-6757 Fax# (901) 543-6324

E-mail: George.X.Stewart@state.tn.us
Shipping: 119 North Riverside Drive
Memphis, TN 38103

Mailing: 119 North Riverside Drive Memphis, TN 38103

#### CLARKSVILLE WELCOME CENTER

Ralph Smith, Manager (931) 684-5509 Fax# (931) 648-5510

E-mail: Ralph.E.Smith@state.tn.us
Shipping: I-24 northwest of Nashville
on the Kentucky line
Clarksville, TN 37040

Mailing: P.O. Box 30187 Clarksville, TN 37040-0004

#### MITCHELLVILLE WELCOME CENTER

Sherry Stratton, Manager (615) 325-4721 Fax# (615) 325-7093

E-mail: Sherry.Stratton@state.tn.us
Shipping: 6111 Lake Spring Road
Portland, TN 37148
Mailing: 6111 Lake Spring Road

ng: 6111 Lake Spring Roa Portland, TN 37148

#### ARDMORE WELCOME CENTER

Janice Rich, Manager (931) 468-2654 Fax# (931) 468-2555

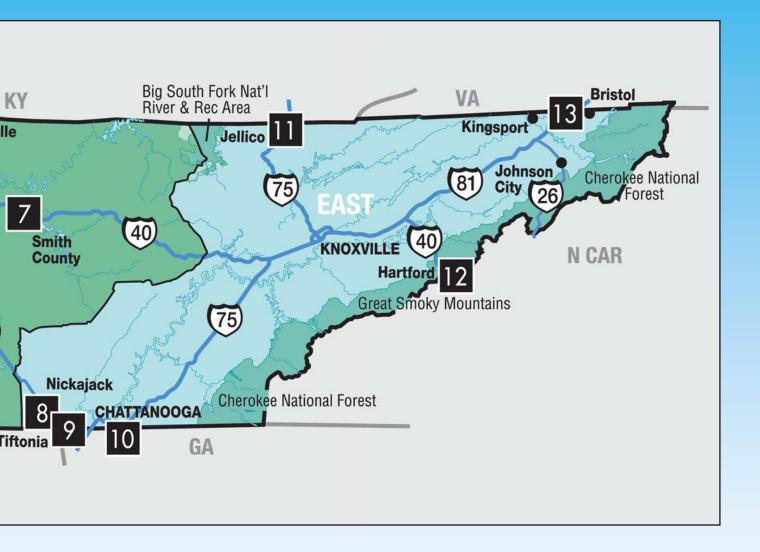
E-mail: <u>Janice.Rich@state.tn.us</u>
Shipping: I-65 south of Nashville on

the Alabama line
Ardmore, TN 38449

Mailing: P.O. Box 1166
Ardmore, TN 38449-9998



## THE STAGE IS SET FOR YOU!



7 SMITH COUNTY WELCOME CENTER
Cynthia lared Manager

Cynthia Jared, Manager (615) 683-6410 Fax# (615) 683-6553

E-mail: <u>Cynthia.Jared@state.tn.us</u>
Shipping: I-40 east of Nashville
Carthage, TN 37030

Mailing: P.O. Box 11

Buffalo Valley, TN 38548

TIFTONIA WELCOME CENTER Eddie Johnson, Manager (423) 821-2628

Fax# (423) 821-4895 E-mail: <u>Eddie.Johnson@state.tn.us</u>

Shipping: I-24 at Chattanooga on the Alabama and Georgia lines Tiftonia, TN 37419

Mailing: P.O. Box 2037 St. Elmo, TN 37409 JELLICO WELCOME CENTER
Rick Parks, Manager

(423) 784-5820 Fax# (423) 784-7738

E-mail: Rick.Parks@state.tn.us
Shipping: I-75 north of Knoxville
on the Kentucky line
Jellico, TN 37762

Mailing: 16320 Interstate 75 Jellico, TN 37762

NICKAJACK WELCOME CENTER

Esther Bowles, Manager (423) 942-0933 Fax# (423) 942-5724

E-mail: <u>Esther.Bowles@state.tn.us</u>
Shipping: I-24 west of Chattanooga on the Alabama line

Jasper, TN 37347
Mailing: P.O. Box 518
Jasper, TN 37347

CHATTANOOGA WELCOME CENTER

Jan Elliott, Manager (423) 894-6399 Fax# (423) 892-7723

Mailing:

E-mail: <u>Jan.Elliot@state.tn.us</u>
Shipping: I-75 south of Chattanooga

on the Georgia line East Ridge, TN 37412 P.O. Box 9415 East Ridge, TN 37412 12 HARTFORD WELCOME CENTER

Laura Munn, Manager (423) 487-3258 Fax# (423) 487-3928

Mailing:

E-mail: <u>Laura.Munn@state.tn.us</u>
Shipping: I-40 southeast of Newport

on the North Carolina line Hartford, TN 37753 P.O. Box 100 Hartford, TN 37753 3 BRISTOL WELCOME CENTER

Jim Bibee, Manager (423) 764-5821 Fax# (423) 854-5335

E-mail: Jim.Bibee@state.tn.us
Shipping: 1-81 northeast of Knoxville

on the Virginia Line Bristol, TN 37620

Mailing: P.O. Box 3608 Bristol, TN 37625

> NOTE: Chattanooga Welcome Center will be closing in November 2005 for reconstruction.

## REGIONAL MARKETING AND PUBLIC RELATIONS MANAGERS

The three regions of the State of Tennessee – West, Middle and East – are each unique and distinctive. The physical characteristcs of each region speak directly to the uniqueness of the state – the West is made up of fertile flatlands, the Middle has rolling hills and the East is mountainous. Because of these and other diverse characteristics, the Department has three regional marketing and public relations managers to represent each area.

These professionals serve as direct liaisons connecting the Department to the industry from the three regions. With offices in Jackson, Nashville and Knoxville, the managers assist in the implementation of the Department's communications, marketing and sales initiatives. The managers support communication efforts by helping to get the word out through national, regional and local media outlets, including radio, television, newspaper and Internet. The group assists with various marketing activities by keeping the industry well-informed of activities that promote the state. The managers work with the sales division by participating in consumer shows throughout the country, as well as within the state, to ensure a strong and effective presence in promoting the state.

The managers represent the Department at numerous meetings and serve on various boards in each region. They are often requested to speak to groups within the industry as well as outside, publicizing the state's more than 700 festivals and outdoor events as well as the many destinations and attractions within the state.

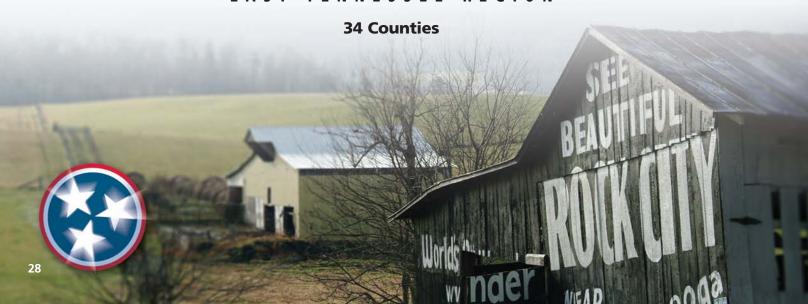
#### WEST TENNESSEE REGION

21 Counties

#### MIDDLE TENNESSEE REGION

**40 Counties** 

#### EAST TENNESSEE REGION



## THE STAGE IS SET FOR YOU!



#### STRATEGIC PARTNERS

The Department of Tourist Development continues to have active and productive partnerships with other state agencies. These cooperative programs have directly impacted promotional opportunities for the travel industry or have directly supported the delivery of services provided by the Department. Governor Bredesen's initiative, to open the lines of communication among state agencies through partnering, continues to provide opportunities for utilizing resources. Our partnerships include the following:

**Department of Agriculture** – The tourist development regions directly benefited from this partnership, using federal grant monies provided by **USDA Rural Development** through the Department of Agriculture, to develop regional brochures promoting agri-tourism attractions. The Department established a presence on our Web site promoting agri-tourism destinations and the Pick Tennessee Products promotion, as well as listings in our official Tennessee Vacation Guide.

**University of Tennessee** – The faculty and staff of the UT Knoxville Tourism Institute, in conjunction with the Tennessee Department of Tourist Development, continue to work on a variety of tourism-related initiatives that will provide valuable, significant information and support to the state's tourism industry.

**Economic and Community Development** – The Department continues to develop a strong working relationship with the Department of Economic and Community Development, including the utilization of its creative and marketing support services, community support services, the Governor's Jobs Cabinet and the Fast Track Program. This relationship allows the Department to further grow as a major economic driver in this state.

In August, 2005 the Department announced a new "Three Star Tourism Incentive Program." This program provides a special advertising opportunity for communities that reach a level "3" of the Three Star Program.

**Environment and Conservation** – The Department has provided marketing assistance to Tennessee's State Parks by providing a new link and higher visibility on our Web site. Furthermore, the parks have joined with the Department in promotional opportunities at strategic outdoor consumer shows.

In addition to our partnerships with other state departments, the TDTD continues our Strategic Partners initiative that provides promotional sponsorship opportunities to the public and private sectors. These promotional opportunities on the Department's Web site, welcome centers, and special e-mail communications, give the private sector the opportunity for additional exposure. The revenue generated from this program brings additional marketing dollars to the Department.





#### INDUSTRY AND ECONOMIC RESEARCH

The Department has completed important research conducted by Longwoods International to determine Tennessee's image, based on the new advertising campaign, "Tennessee. The Stage Is Set For You!" as a travel destination, as well as our strengths and weaknesses compared to collar states.

The research identifies what is important to the traveler in choosing Tennessee over the competition and what message our advertising needs to convey to visitors in order to get travelers interested in visiting Tennessee. The results of this research were essential to our efforts to develop the Department's new creative campaign. The Department plans to continue utilizing Longwoods International to further research the effectiveness of the campaign message, determining return on investment (ROI) and helping future media plans.

Over the past two years, the Department has partnered with the Department of Revenue to provide a new Tennessee Tourism Trends Report on the Department's Web site. This report provides information on state sales tax collections, local tax collections and total sales for the travel and tourism industry-related tax codes. The information is updated quarterly and is available at <a href="https://www.state.tn.us/tourdev/reports">www.state.tn.us/tourdev/reports</a>. These reports provide sales and tax information by county and allow the industry the flexibility to compare the information to previous years. It is not intended to match the reports prepared by the Travel Industry of America (TIA). It is intended to give readers a more current trend of tourism activity in a specific county.

The Department will subscribe to the research provided by the Travel Industry of America (TIA). The 2004 Economic Impact of Travel on Tennessee Counties and the TIA Travelscope research for 2004 are now available to the industry. The Department continues to provide the industry with the most current economic impact of travel data available from TIA.

#### FEDERAL GRANT OPPORTUNITIES

Through our partnership with other state agencies, the Department has successfully utilized federal grants to support departmental programs. We will continue to research new partnerships for funding opportunities in the coming year.

In addition, the Department has developed an online grant opportunities resource page that can be utilized by local governments, communities and businesses within the tourism industry for our tourism partners. This information will be updated on a monthly basis and is located at <a href="http://www.state.tn.us/tourdev/onlineservices.html">http://www.state.tn.us/tourdev/onlineservices.html</a>. The resource page may include information on how to apply for grants as well as various resources where grants may be available.



#### STATE OF THE INDUSTRY

According to TravelScope®, U.S travel totaled 1,202,736,000 person-trips in 2004, compared to 1,162,740,000 in 2003. Of this total, 43,644,000 person-trips were taken to and through Tennessee. This includes "pass-throughs," day trips and overnight trips.

- Of the total household trips, 28% included children. Of household trips which included children, the average number of children on the trip was 1.9.
- The total household travel party size was 2.2 persons.
- Of all person-trips, an average of 1.8 nights were spent in Tennessee, while an average of 3.7 nights were spent on the entire trip.
- The average (mean) in-state expenditure per trip was \$273.
- During 2004, domestic and international traveler spending in Tennessee generated 175,720 jobs, including full-time and seasonal/part-time positions in the state.

Source: TravelScope® 2004

#### **ECONOMIC IMPACT**

(\$ billions)

2004	1.50
2003	0.80
2002	0.60
2001\$	9.87
2000	9.93
1999\$	
1998\$	
1997\$	
1996\$	
1995	7.98

Source: TravelScope® 2004

Source: U.S. Travel Data Center/TIA, Economic Impact of Travel on Tennessee Counties

#### VISITORS TO TENNESSEE

(person-trips in millions)

2004 (projected) 43.6
2003 42.8
2002
2001
2000
1999
1998
1997
1996
1995

Source: TravelScope® 2004

### STATE OF ORIGIN FOR VISITORS TO TENNESSEE (millions)

2.	Georgia
3.	Alabama
4.	Kentucky
5.	North Carolina
6.	Ohio1.8
7.	Texas
8.	Florida
9.	Indiana
10.	Mississippi

Source: TravelScope® 2004





### TENNESSEE'S RANKING AMONG TOP 20 STATES IN DOMESTIC VISITORS

(millions)

### TOP 25 STATES 2004-05 PROJECTED DOMESTIC ADVERTISING BUDGET BY RANK

(\$ millions)

	State	# Projected Visitors		State	2004-2005	2003-2004
1.	California		1.	Texas		
2.	Florida		2.	Florida		
3.	New York		3.	Pennsylvania		
4.	Texas		4.	New Jersey		
5.	Pennsylvania		5.	Arizona		
6.	Illinois		6.	Illinois		
7.	Ohio		7.	Louisiana		
8.	North Carolina		8.	Arkansa		
9.	Georgia		9.	Missouri		
10.	Virginia		10.	Virginia		
11.	TENNESSEE	43,644	11.	South Carolina		
12.	New Jersey		12.	North Carolina		
13.	Nevada		13.	South Dakota		
14.	Michigan		14.	Wisconsin		
15.	Missouri		15.	West Virginia		
16.	Wisconsin		16.	Michigan		
17.	Indiana		17.	Maryland		
18.	South Carolina		18.	Minnesota		
19.	Arizona		19.	Alaska		
20.	Washington		20.	Oklahoma		
Sou	rce: TravelScope® 2004		21.	Georgia		
<b>3</b> 00	rce. Haveiscope* 2004		22.	Massachusetts		
			23.	Maine		
			24.	Colorado		
			25.	TENNESSEE	3.0	3.4
			Soui	rce: 2004-2005 Survey o	f U.S. State & 1	Гourism

Source: 2004-2005 Survey of U.S. State & Tourism Office Budgets, TIA

#### 2004 DOMESTIC TRAVEL-GENERATED EMPLOYMENT IN TENNESSEE BY INDUSTRY

	Travel-generated	% of	% Change
	Employment	<b>Domestic Total</b>	over 2003
	(thousands)	(percent)	(percent)
Foodservice	65.7	38.3%	0.6%
Public Transportation	48.3	28.2%	5.0%
Lodging	22.6	13.2%	1.9%
Entertainment & Recreation	15.4	9.0%	4.6%
General Retail Trade	13.6	7.9%	1.3%
Auto Transportation			
Travel Planning			
Domestic Total	171.5%	100.0%	1.0%

Source: TIA/The Economic Impact of Travel on Tennessee Counties 2004

## TENNITESSIA

### TYPES OF INTERNET SITES USED FOR TRAVEL BOOKING

(Among 44.6 Million Online Travelers Who Booked Travel Online)

2004	2003	2002	2001
Online Travel Agency Sites 69%	63%	61%	57%
Company Sites 54%	63%	57%	75%
Search Engine Sites 31%	44%	37%	34%
Destination Sites 22%	25%	20%	26%
Travel Guide Sites9%	7%	10%	7%
Special Interest Sites 5%	9%	12%	9%
Newspaper/Magazine Sites 4%	6%	10%	7%
Community Sites 3%	4%	5%	5%

#### **GROWTH IN USE OF THE INTERNET**

	Past Year Travelers	Frequent Travelers
Internet Users 2004 1	45.7 million	. 61.3 million
Growth since 2003	+1%	+1%
Growth since 2002	+10%	+2%
Growth since 2001	+1%	+2%
Growth since 2000	+7%	+5%
Growth since 1999	+25%	+35%
Growth since 1998	+48%	+44%
Growth since 1997	. +129%	+142%
Growth since 1996	. +256%	+283%

### TRAVEL PRODUCTS/SERVICES PURCHASED ONLINE LAST YEAR

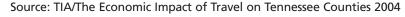
(Among 42.2 Million Online Travelers Who Booked Travel Online)

	2004	2003	2002
Airline Tickets	82%	75%	77%
<b>Overnight Lodging Accommodations</b>	67%	71%	57%
Rental Car or RV	40%	43%	37%
Tickets-Cultural Events	23%	32%	25%
Travel Packages	16%	12%	21%
Tickets-Amusement Parks	14%	16%	12%
Tickets-Spectator Sporting Events	13%	18%	18%
Reservations for Personal Sports	12%	11%	13%
(golf/skiing/water sports)*			
Tickets-Museum or Festival	11%	10%	11%
Tickets-Tour or Excursion	11%	4%	6%
Cruises	. 8%	9%	6%

Source: Travel Industry of America, Travelers' Use of the Internet, 2004 Edition

#### 2004 DIRECT DOMESTIC TRAVEL SPENDING IN TENNESSEE BY INDUSTRY SECTOR

	Travel Expenditures (\$ millions)	% of Domestic Total (percent)	% Change over 2003 (percent)
Foodservice	3,631.1	32.5%	4.0%
Lodging	1,933.6	17.3%	3.2%
Auto Transportation	1,875.7	16.8%	12.6%
General Retail Trade	1,316.4	11.8%	3.5%
Entertainment & Recreation	1,232.0	11.0%	4.8%
Public Transportation	1,174.7	10.5%	6.5%
Domestic Total	11,163.5	100.0%	5.5%





<sup>\*</sup> Survey information began in 2002



#### **2004 TENNESSEE VACATION GUIDES REQUESTED BY STATE**

Source: USA 800 (2004 data)

#### **LODGING USED IN TENNESSEE**

2004	2003	2002
Hotel/Motel/Bed & Breakfast 38%	34%	40%
Private Home 18%	20%	18%
Condo/Time Share 4%	3%	4%
RV/Tent	3%	3%
Other5%	4%	5%
No Overnight Stay 38%	39%	34%

#### **PRIMARY PURPOSE OF TRIP**

2004	2003	2002
Visit Friends/Relatives 41%	39%	42%
Personal21%	18%	12%
Entertainment19%	17%	20%
Business	10%	10%
Business/Convention 12%	5%	3%
Outdoor Recreation 5%	6%	5%
Combined Business/Pleasure3%	4%	4%
Other1%	1%	4%

#### PRIMARY MODE OF TRANSPORTATION

2004	2003	2002
Auto (net) 87%	88%	87%
Own Auto/Truck 81%	82%	80%
Rental Car 4%	4%	5%
Camper/RV2%	2%	2%
Airplane	10%	8%
Other4%	2%	3%
Bus2%	1%	2%

Source: TravelScope® 2004

#### **VISITOR ACTIVITIES IN TENNESSEE**

2004	2003	2002
Shopping 28%	27.3%	29%
Rural/Urban Sightseeing 10%	16.3%	No data
Historic Places/Museums9%	8.9%	12%
National/State Parks9%	6.8%	12%
Outdoor Recreation 7%	7.6%	9%
Theme/Amusement Parks 7%	5.7%	8%
Cultural Events/Festivals2%	1.8%	7%
Nightlife/Dancing 4%	4.7%	5%
Sports Events 4%	3.8%	4%
Golf/Tennis/Skiing2%	2.8%	2%

Source: TravelScope® 2004

### TENNESSEE NATIONAL BATTLEFIELDS, PARKS & RECREATION AREAS 2004 VISITATION

_		2004
Ra	nk Attraction	Visitation
1.	Natchez Trace Parkway,	
	Nashville to Natchez, Miss	. 13,330,221
2.	Great Smoky Mountains National Park,	
	Gatlinburg	
3.	Cherokee National Forest	2,500,000
4.	Land Between the Lakes, Golden Pond	1,847,566
5.	Ocoee River (Middle & Upper Ocoee),	
	Ocoee	•
6.	Cumberland Gap National Military Park,	
_	Cumberland Gap	929,583
7.	Chickamauga-Chattanooga National	044.005
_	Military Park (Point Park), Chattanooga	914,836
8.	South Cumberland Recreation Area,	070 220
^	Monteagle	8/9,220
9.	Fort Donelson National Military Park,	722.200
10	Dover	
	Big South Fork NRRA, <i>Jamestown</i> Shiloh National Military Park, <i>Shiloh</i>	
	Ocoee White Water Center.	422,393
12.	Ducktown	310 986
13	Obed Wild & Scenic River,	510,500
15.	Morgan & Cumberland County	253 482
14.	Hiwassee River, Reliance	
	Stones River National Battlefield.	203,337
	Mufreesboro	208,159
16.	Andrew Johnson National Historical Site	•
So	urce: National Park Service,	

Source: National Park Service, http://www2.nature.nps.gov/stats/ or provided by individual attractions





#### 2004 TENNESSEE'S TOP 50 ATTRACTIONS\*\* REPORT

Rank	c Attraction	2004 Visitation Rai	nk	Attraction	2004 Visitation
1.	Dollywood, <i>Pigeon Forge</i>		5.	Lake Winnepesaukah, Chattanooga	300,000
2.	Ripley's Aquarium of the Smokies,	26	5.	Louise Mandrell Theater, Pigeon Forge	290,001
	Gatlinburg	1,600,000 27	7.	Country Music Hall of Fame, Nashville	288,061
3.	Bristol Motor Speedway, Bristol		3.	Adventure Science Center, Nashville	272,103
4.	Ober Gatlinburg, Gatlinburg		9.	Ryman Auditorium, Nashville	270,326
5.	Tennessee Aquarium, Chattanooga	856,000 30	).	General Jackson Showboat, Nashville	250,000
6.	Golf & Games Family Park, Memph	<i>is</i> 825,000 31	١.	Renaissance Center, Dickson	250,000
7.	Memphis Zoo, Memphis		2.	$\label{libertyland/Mid-South Fair, $\textit{Memphis}$ } \\$	246,044
8.	*Casey Jones Village, Jackson		3.	Creative Discovery Museum, Chattanoog	ga 218,000
9.	Grand Ole Opry House & Opry Mus	seum, 34	Į.	*Jack Daniel Distillery, Lynchburg	200,000
	Nashville	662,495 35	5.	Nashville Motor Speedway, Nashville	200,000
10.	Chattanooga Choo Choo, Chattano	oga 592,360 36	5.	Cheekwood-TN Botanical Gardens	
11.	Loretta Lynn's Ranch, Hurricane Mi	lls 578,000		& Museum of Art, Nashville	190,000
12.	Memphis Motorsports Park, Memph	his 568,244 37	7.	The Hermitage, Nashville	190,000
13.	Tennessee Aquarium IMAX 3D The	ater, 38	3.	Music City Motorplex, Nashville	190,000
	Chattanooga	506,000 39	9.	Memphis Botanic Gardens, Memphis	186,000
14.	Nashville Zoo, <i>Nashville</i>		).	Lost Sea, Sweetwater	180,000
15.	Gatlinburg Sky Lift, Gatlinburg		١.	Cumberland County Playhouse, Crossvill	e 175,143
	Memphis Pink Palace, Memphis			Mud Island River Park, Memphis	
17.	Lookout Mountain Incline Railway,	43	3.	National Civil Rights Museum, Memphis	160,000
	Chattanooga			Bays Mountain Park & Planetarium,	
18.	Rock City Gardens, Chattanooga	405,246		Kingsport	155,436
19.	Knoxville Zoological Park, Knoxville			Museum of Appalachia, Norris	
20.	Ruby Falls, Chattanooga			Belle Meade Plantation, Nashville	
21.	Dolly's Splash Country,	47	7.	Children's Museum of Memphis, Memph	nis 143,639
	Pigeon Forge			West Tennessee Delta Heritage Center,	
	Nashville Shores, <i>Nashville</i>			Brownsville	143,110
23.	TN River Fresh Water Pearl Farm, To			American Museum of Science & Energy,	
	Museum & Mini Theater, Camden .			Oak Ridge	133,700
24.	Frist Center for the Visual Arts, Nas	hville 306,561 50	).	The Parthenon, Nashville	132,035

<sup>\*</sup>Free admission.

Source: Visitation information provided by individual attraction. Listing includes only those attractions that reported attendance.

Attractions eligible to be listed in Tennessee's Top Attractions List include:

- Amusement/Theme Parks
- Cultural/Historic Organizations including museums, heritage sites/attractions, historic homes, estates and plantations.
- Dining/Entertainment Attractions such as dinner theaters, live performing art venues and theme restaurants
- Scenic/Natural Areas such as show caves and national, state or local parks
- · Scientific/Educational Institutions including discovery centers, libraries and science museums
- Sightseeing Companies such as dinner cruises and helicopter or walking tour operations
- Zoos/Aquariums and Wild Animal Parks

\*\***Definition of Attraction**: Something that attracts or is intended to attract people by appealing to their desires and tastes.

Source: Miriam-Webster Dictionary and TIA

### RANKING OF TOP 20 U.S. STATES IN 2003 BY DOMESTIC TRAVEL EXPENDITURES

<b>D</b>	l. 64-4-	Expenditures	
Ran	k State	(\$ millions)	U.S. Total
1.	California	61,074.5	12.4%
2.	Florida	42,892.7	8.7%
3.	Texas	31,471.0	6.4%
	New York		
5.	Illinois	21,594.7	4.4%
6.	Nevada	19,319.1	3.9%
7.	Pennsylvania	15,237.3	3.1%
	New Jersey		
9.	Georgia	14,523.8	3.0%
	Virginia		
11.	North Carolina	12,631.5	2.6%
12.	Ohio	12,419.0	2.5%
13.	Michigan	11,989.5	2.4%
14.	TENNESSEE	10,579.8	2.2%
15.	Massachusetts	9,952.3	2.0%
16.	Colorado	9,193.2	1.9%
17.	Missouri		1.9%
18.	Arizona		1.9%
19.	Louisiana		1.8%
20.	Maryland		1.8%
	Top 20 State Total .		
	U.S. Total	490,869.7	100.0%

#### SHARE OF DOMESTIC TRAVEL EXPENDITURES IN THE SOUTH REGION BY STATE – 2003

		Domestic	% of
Ran	k State	<b>Expenditures</b>	South Region
Ran	k State	(\$ millions)	Total
1.	Florida	42,892.7	36.6%
2.	Georgia	14,523.8	12.4%
3.	North Carolina	12,631.5	10.8%
4.	TENNESSEE	10,579.8	9.0%
5.	Louisiana	9,055.0	7.7%
6.	South Carolina	7,215.4	6.2%
7.	Alabama	5,549.4	4.7%
8.	Kentucky	5,432.6	4.6%
9.	Mississippi	5,432.4	4.6%
10.	Arkansas	3,846.3	3.3%
	South Region Tota	l117,158.9	100%

Source: TIA

Based on 2003 ranking, the latest available at this time

Source: TIA

Based on 2003 ranking

#### **TRAVELERS TO AND THROUGH TENNESSEE 1994-2004**

(millions)

Business					
Year	Out-of-State Only	In-State	Pleasure	Convention	Total
2004	33.9	9.7	37.1	6.4	43.6
2003	37.2	9.6	34.3	6.2	42.8
2002	31.1	7.7	25.6	5.2	38.8
2001	30.2	7.7	25.1	5.1	37.9
2000	24.9	10.8	23.0	5.8	35.7
1999	26.6	11.2	24.8	6.1	37.8
1998	25.9	12.6	25.2	6.5	38.4
1997	27.1	13.1	25.5	6.5	40.2
1996	26.4	12.3	25.9	6.2	38.8
1995	27.1	11.1	25.4	6.2	38.2
1994	25.4	11.2	24.3	6.0	36.6



Source: TIA Economic Impact of Travel on Tennessee Counties in 2004



### 2004 IMPACT OF U.S. RESIDENT TRAVEL ON TENNESSEE RANKING OF COUNTIES BY EXPENDITURE LEVELS

County	\$ Million	County	\$ Million	County \$ Million	County\$ Million
Davidson	3,215.90	Campbell	39.70	Hardeman 17.56	Unicoi 6.17
Shelby	2,455.99	Dickson	39.64	Giles 17.05	Grundy 6.06
Sevier	1,206.31	Obion	34.91	Polk 16.89	Overton 6.00
Knox	637.09	Jefferson	34.19	Henderson15.97	Crockett 5.83
Hamilton	601.31	Cocke		Lincoln15.17	Meigs 5.83
Sullivan		Dyer	30.10	Franklin 15.10	Stewart 5.78
Blount	210.07	Loudon	29.98	Weakley 13.63	Pickett 5.74
Williamson	195.10	McMinn	29.79	Cheatham 13.53	Clay 5.71
Rutherford	177.08	Monroe	29.77	White 13.33	Hickman 5.55
Washington	157.43	Lawrence	28.49	Carroll 13.10	Fayette 5.13
Madison	129.40	DeKalb	27.78	Lauderdale 12.40	Macon 5.11
Montgomery.	118.18	Gibson	25.84	Claiborne12.14	Union 5.08
Bradley		Robertson	25.52	Grainger 11.43	Sequatchie 4.99
Cumberland .	81.34	Hardin	25.23	Haywood10.65	Perry 4.91
Anderson	79.43	Hawkins	24.78	Fentress 9.62	Lewis 4.36
Wilson	79.08	Humphreys	24.20	Scott 8.91	Houston 4.31
Putnam		Rhea	23.95	Decatur 8.53	Morgan 3.43
Sumner		Marion		Wayne 8.20	Cannon 3.01
Maury	72.63	Carter	22.94	Lake 8.13	Bledsoe 2.73
Hamblen	62.61	Warren		Johnson 7.71	Trousdale 2.60
Greene	58.81	Bedford	20.77	Smith 7.53	Jackson 1.80
Coffee	53.69	Tipton	19.08	McNairy 7.40	Moore 1.07
Roane	44.89	Marshall	17.81	Van Buren 7.14	Hancock 0.94
Henry	39.92	Benton	17.56	Chester 6.73	TOTALS11,163.51

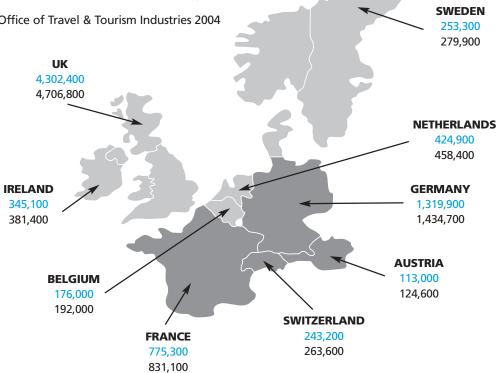
Source: TIA Economic Impact of Travel on Tennessee Counties in 2004

### TOP SOUTHEASTERN STATES FOR INTERNATIONAL VISITORS

# Florida 4.4 million Georgia 427,000 North Carolina 305,000 Virginia 305,000 Louisiana 285,000 TENNESSEE 183,000 South Carolina 163,000

### UNITED KINGDOM REPRESENTATIVE

- GERMAN REPRESENTATIVE
  - 2004 Arrivals in Blue
  - Predicted Arrivals in 2005 in Black



#### TOP TEN INBOUND TRAVEL MARKETS FOR THE U.S.

	2005 Projected	2004	2003
Canada	14.694 million	13.849 millio	on 12.660 million
Mexico	12.394	11.906	9.670
United Kingdom	4.707	4.302	3.936
Japan	4.003	3.747	3.170
Germany	1.435	1.320	1.180
France			
South Korea		626	618
Australia		520	
Italy		471	
Netherlands		425	

Source: TIA, Office of Travel & Tourism industries





### EVENTS AND ACTIVITIES CALENDAR FY 2005 - 2006

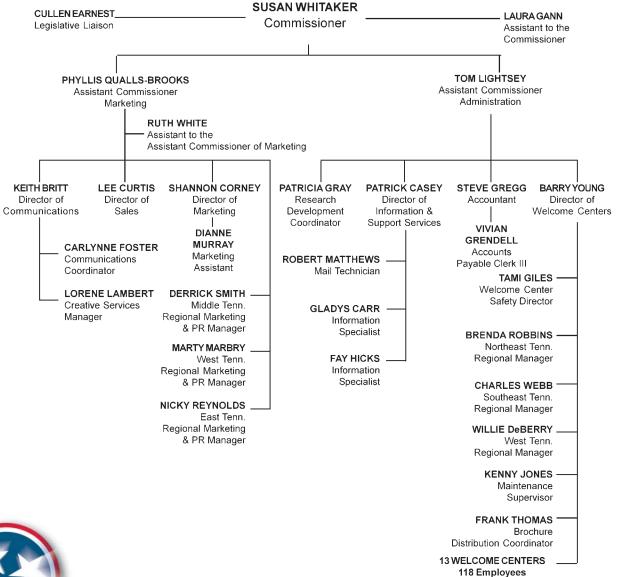
	Trade Shows	Travel Shows	Sales Missions	Professional Development	Special Events, Promotions & Publications
JULY					
AUG	Great American Road Show Louisville, KY Aug. 28 – 30			STS Marketing College Dahlonega, GA, Aug. 1 – 5 TIA ESTO Coeur d' Alene, Idaho, Aug. 13 – 16	Winter Events Deadline Aug. 15
SEPT	SYTA Memphis, TN Sept. 16 – 20		AAA Nashville/Chattanooga/Smoky Mtns. Canadian Sales, Sept. 24 – 30 Travel South USA Canadian Sales Toronto, Ontario Canada, Sept. 26 – 30	STS Fall Meeting Charleston, SC, Sept. 7 – 9 Governor's Conf. on Tourism Franklin, TN, Sept. 21 – 23	Annual Events Deadline Sept. 15
ост	OMCA Toronto, Ontario Canada, Oct. 23 – 26 Rhythms of the South Louisville, KY Oct. 29 – Nov. 1		Grand Ole Opry Road Show/ Sales Mission (Carnegie Hall) New York City Oct. 13 – 15	US Cultural & Heritage Tourism Summit Washington, DC, Oct. 6 – 8 Governor's Regional Conferences on the Arts (East) UT Conference Ctr. Knoxville, TN, Oct. 13 Governor's Regional Conferences on the Arts (Middle) The Renaissance Ctr. Dickson, TN, Oct. 19 TIA Marketing Outlook Forum Seattle, WA, Oct. 26 – 29 Governor's Regional Conferences on the Arts (West) Germantown Performing Arts Ctr. Germantown, TN, Oct. 28	
NOV	NTA Detroit, MI Nov. 4 – 8				Winter Events Released Spring Events Deadline Nov. 15
DEC					2006 Official Tennessee Vacation Guide Released 2006 Annual Events Brochure Released 2006 Official Tennessee Highway Map Released
JAN	<b>TMCA</b> Louisville, KY Jan. 4 – 7	Great American Golf Show Louisville, KY, Jan. 6 – 8 Nashville Boat & Sport Show Nashville, TN, Jan. 11 – 15 Atlanta RV & Camp Show Atlanta, GA, Jan. 19 – 22 Louisville Sports, Boat, RV & Vacation Show Louisville, KY, Jan. 28 – Feb. 16			
FEB	ABA Nashville, TN Feb. 3 – 8 Travel South Showcase Richmond, VA Feb. 18 – 22	Great American Golf Show Indianapolis, IN, Feb. 10 – 12 52nd Annual Indianoplis Boat, Sport & Travel Show Indianapolis, IN, Feb. 17 – 26 Memphis Boat & Sport Show Memphis, TN, Feb. 18 – 29			Summer Events Deadline Feb. 15 Spring Events Released
MAR	NTA Spring Meet Louisville, KY, Mar. 22 – 25			STS Spring Meeting Florida, Mar. 27 – 29	
APR					
MAY	<b>TIA International Pow Wow</b> Orlando, FL May 6 – 10				Autumn Events Deadline May 15 Summer Events Released
JUNE			Deep South UK Sales Mission TBD		CMA Music Festival Nashville, TN, June 8 – 11

## THANNESSEE

## TENNESSEE DEPARTMENT OF TOURIST DEVELOPMENT

**Organizational Chart 2005 - 2006** 









### DEPARTMENT DIRECTORY

Task	Staff Person	Phone	E-mail
AAA/CAA/ABA/NTA	Lee Curtis	(615) 741-9045	Lee.Curtis@state.tn.us
Accounts Payable	Vivian Grendell	(615) 741-9047	Vivian.Grendell@state.tn.us
Advertising	Shannon Meldon-Corney	(615) 741-2288	Shannon.Corney@state.tn.us
Assistant Commissioner-Administration	Tom Lightsey	(615) 741-9023	Tom.Lightsey@state.tn.us
Assistant Commissioner-Marketing	Phyllis Qualls-Brooks	(615) 741-9057	Phyllis.Qualls-Brooks@state.tn.us
Assist. to Assist. Commissioner-Marketing	Ruth White	(615) 741-2530	Ruth.White@state.tn.us
Brochure Approval for Welcome Centers	Tami Giles	(615) 741-9012	Tami.Giles@state.tn.us
Bulk Literature Requests	Gladys Carr	(615) 741-9005	Gladys.Carr@state.tn.us
Commissioner's Office	Laura Gann	(615) 741-9016	Laura.Gann@state.tn.us
Communications Coordinator	Carlynne Foster	(615) 741-7994	Carlynne.Foster@state.tn.us
Creative Services	Lorene Lambert	(615) 741-9025	Lorene.Lambert@state.tn.us
East TN Regional Office	Nicky Reynolds	(865) 777-4685	Nicky.Reynolds@state.tn.us
Economic Impact Report	Patricia Gray	(615) 741-9004	Patricia.Gray@state.tn.us
Events Brochures	Carlynne Foster	(615) 741-7994	Carlynne.Foster@state.tn.us
Fall Color Forecast	Lorene Lambert	(615) 741-9025	Lorene.Lambert@state.tn.us
Federal Grants	Patricia Gray	(615) 741-9004	Patricia.Gray@state.tn.us
Financial Operations	Tom Lightsey	(615) 741-9023	Tom.Lightsey@state.tn.us
Governor's Conference	Shannon Meldon-Corney	(615) 741-2288	Shannon.Corney@state.tn.us
Group Travel/International	Lee Curtis	(615) 741-2200	Lee.Curtis@state.tn.us
Heritage/Cultural Tourism Projects	Lee Curtis	(615) 741-9045	Lee.Curtis@state.tn.us
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